

MISSOURI DIVISION OF TOURISM

September Missouri Travel Barometer
(Data available as of 11/10/20)

Missouri Travel Barometer



The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.

The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Lodging Trends – Week Ended October 31, 2020

OCCUPANCY
was down
37.0%
as compared to
the same week in
2019

**STATEWIDE
DEMAND**
DECREASED
36.1%

ADR
(Average Daily Room Rate)
DECREASED
20.6%

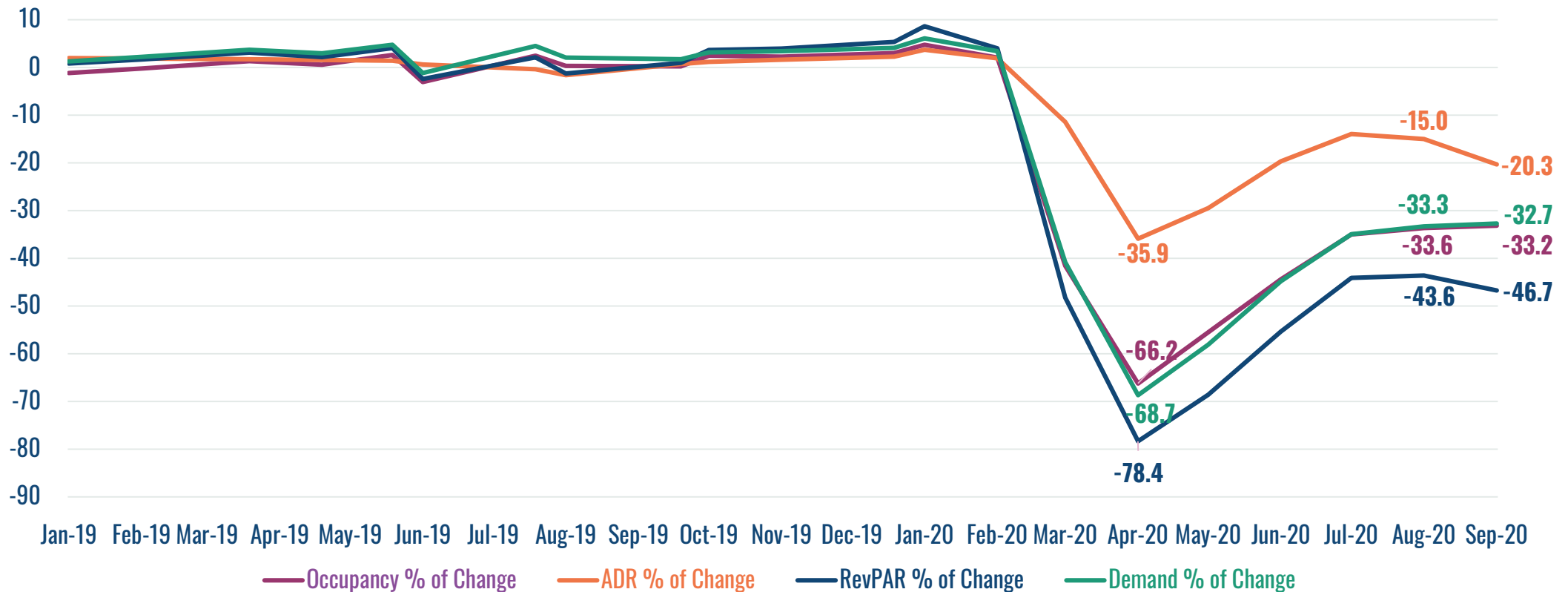
RevPAR
(Revenue per Available Room)
DECREASED
49.9%

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Monthly Lodging Trends Percentage of Change

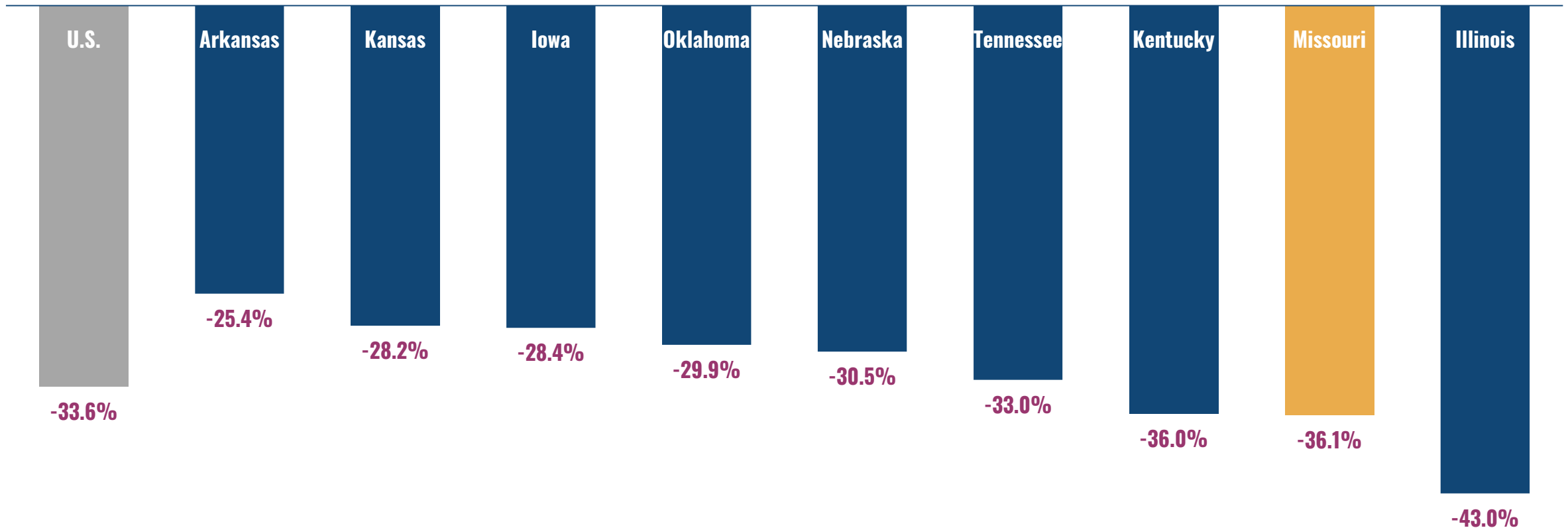


Missouri Travel Barometer

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STR Occupancy Percentage of Change -- September 2020 YTD vs September 2019 YTD Comparison of Neighboring States

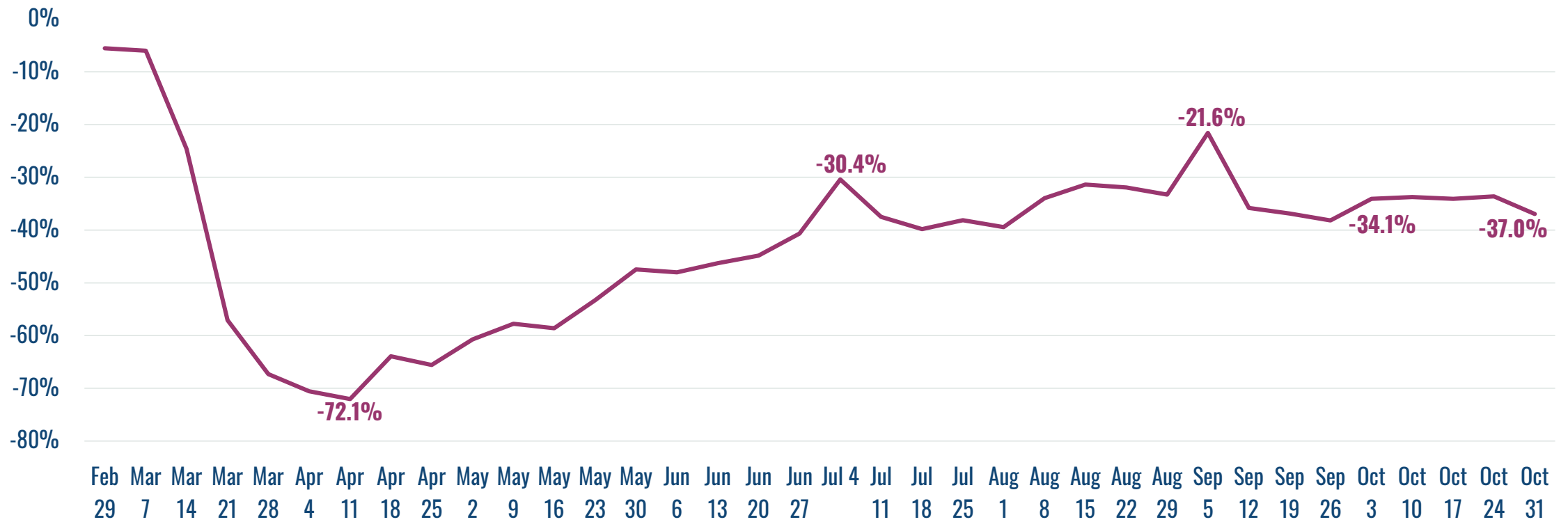


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Lodging Trends Occupancy % of Change from 2019

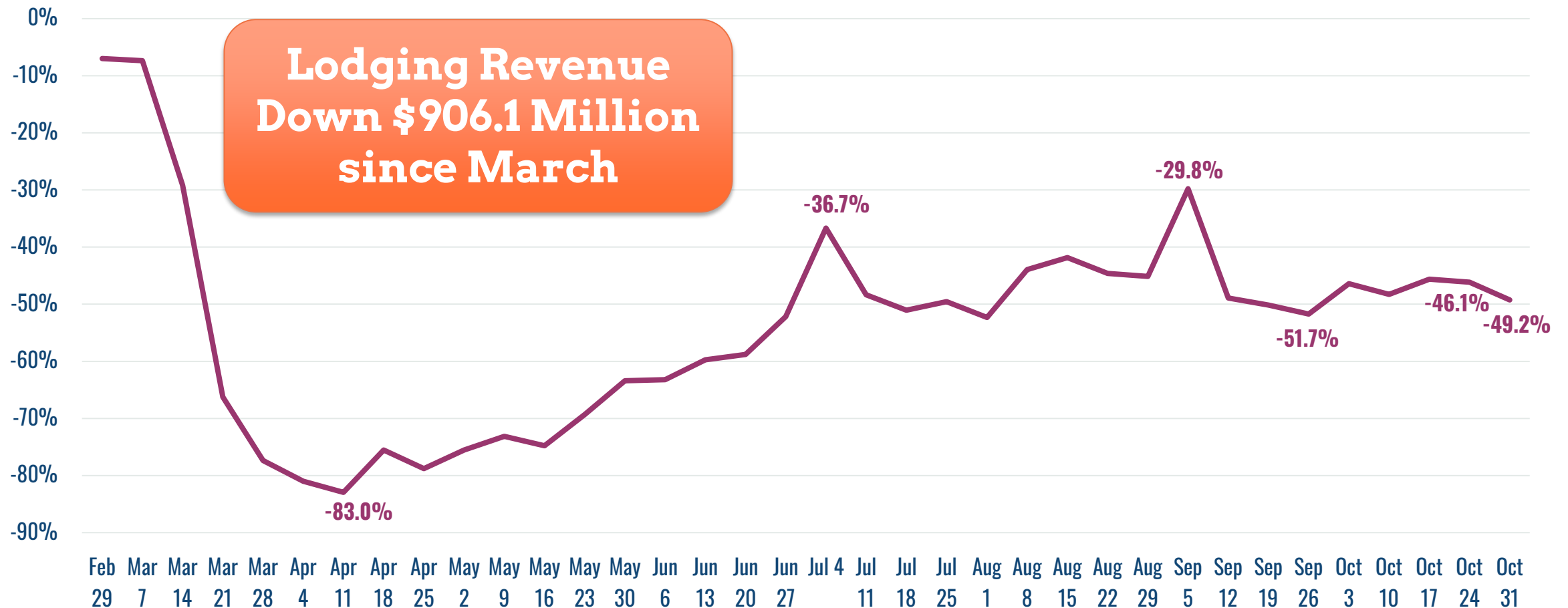


Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



STR Weekly Missouri Lodging Revenue % of Change from 2019



Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rental Trends for Hotel Comparable Rooms

January – September 2020 Compared to 2019

OCCUPANCY
was up

2.4%

as compared to
the time period in
2019

**STATEWIDE
DEMAND
INCREASED**

18.7%

ADR
(Average Daily Room Rate)
INCREASED

9.8%

RevPAR
(Revenue per Available Room)
INCREASED

13.2%

AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

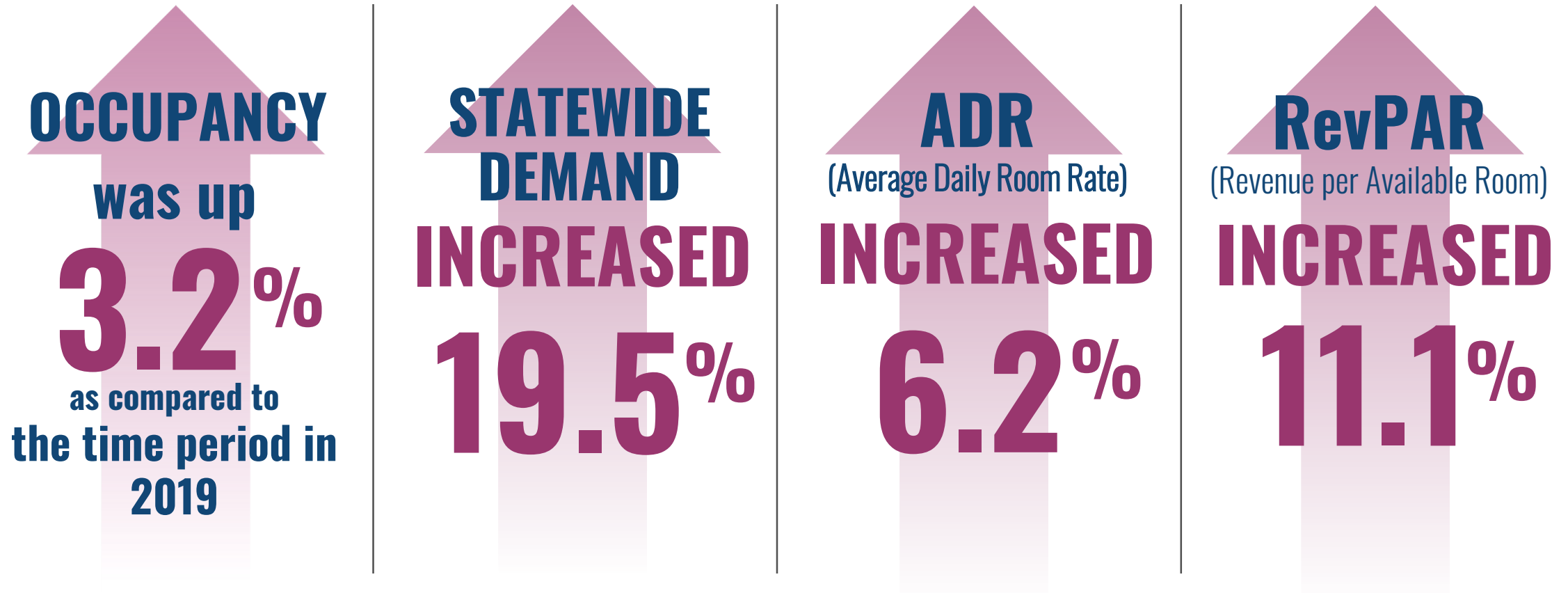
Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29



AirDNA Short-Term Rental Trends for Entire Place Rentals

January – September 2020 Compared to 2019



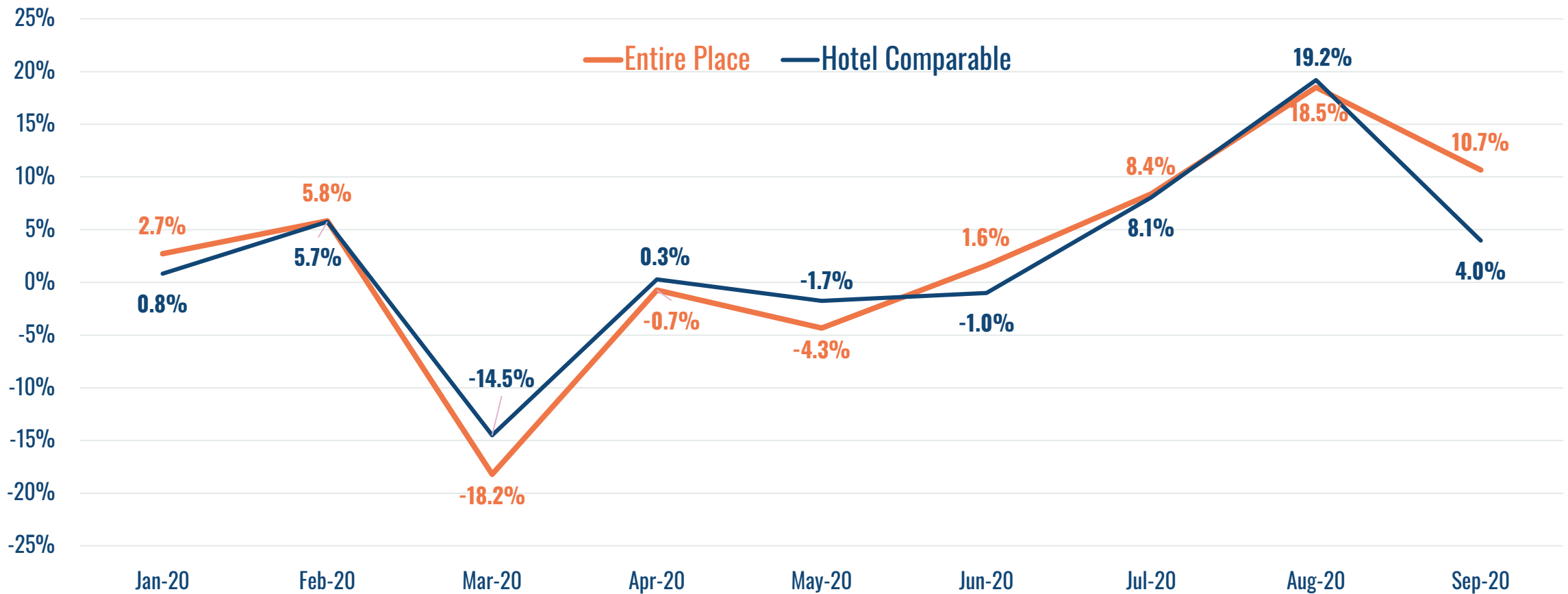
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

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AirDNA Short-Term Rentals Occupancy% of Change from Prior Year



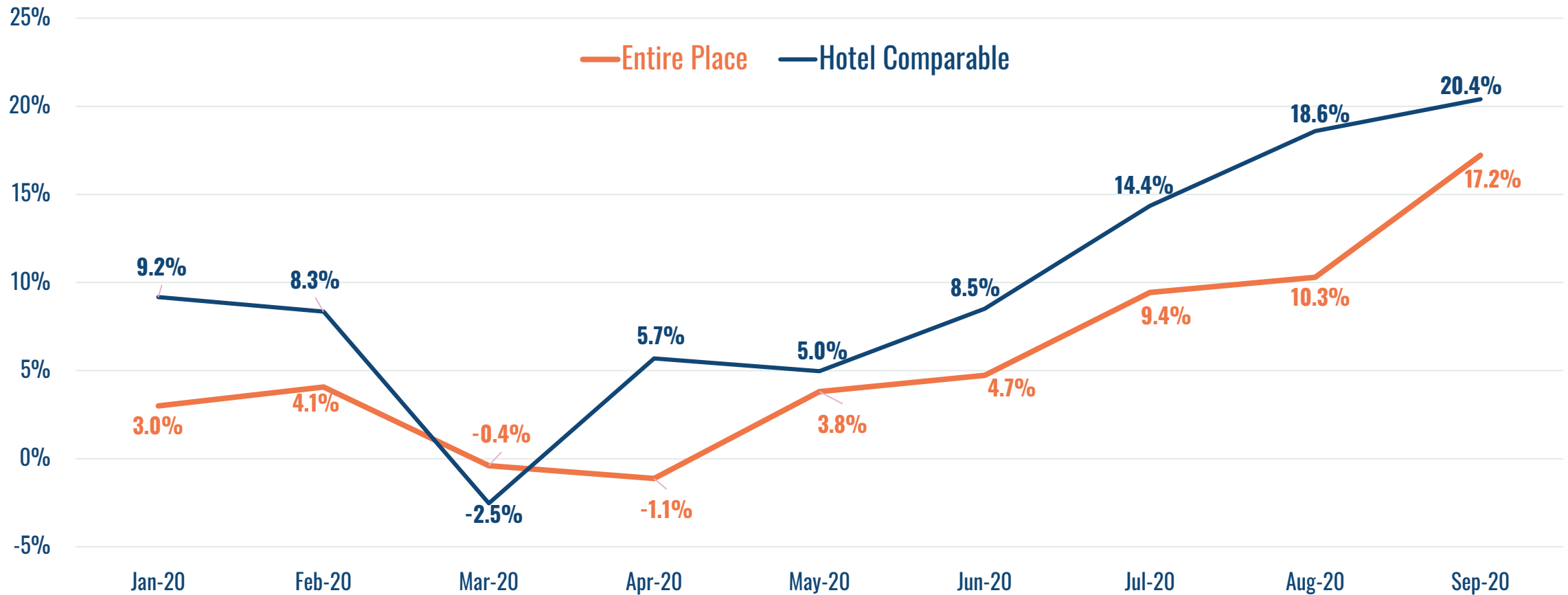
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

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AirDNA Short-Term Rentals ADR % of Change from Prior Year



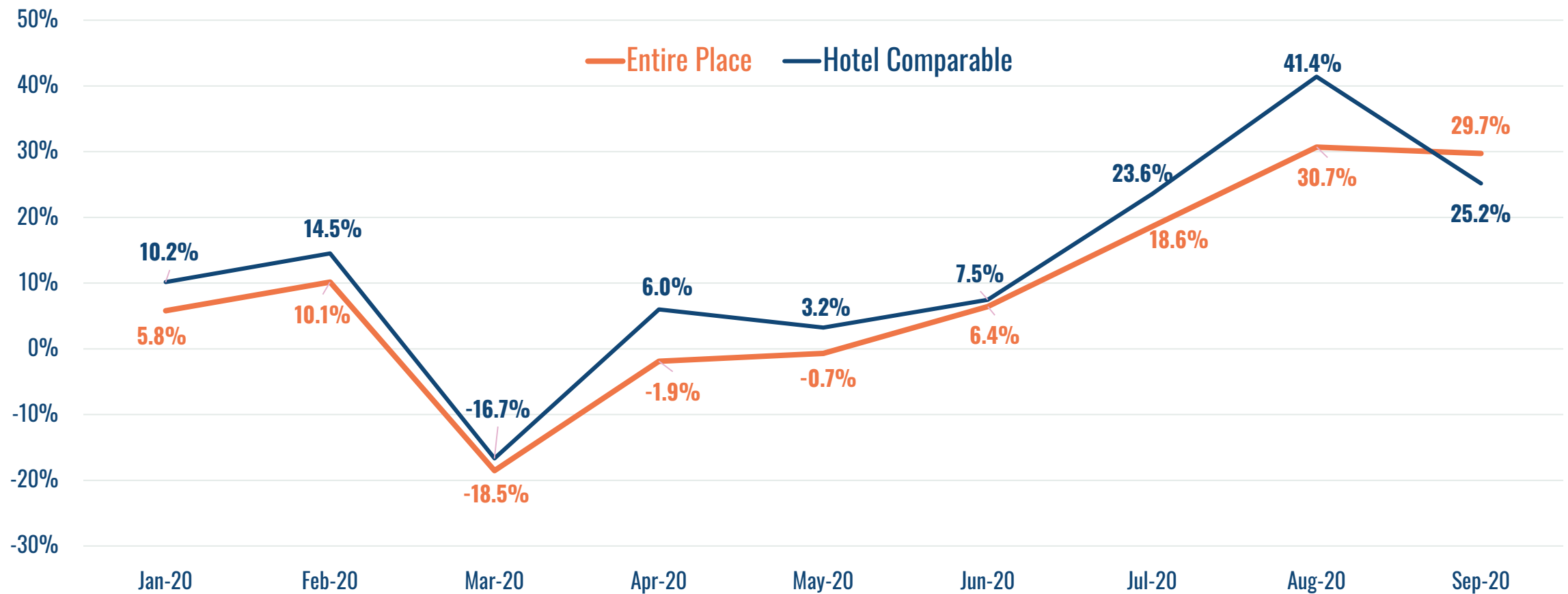
AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

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AirDNA Short-Term Rentals RevPAR % of Change from Prior Year



AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales through August 2020

**August
2020 saw a**
-17.8%
(\$218.5 million)
DECREASE
**in tourism-related sales
revenue compared to
August 2019**

**For FYTD20,
preliminary reports
for Jul-Jun indicate a**
-10.9%
(\$1.5 billion)
DECREASE
**in tourism-related
sales revenue**

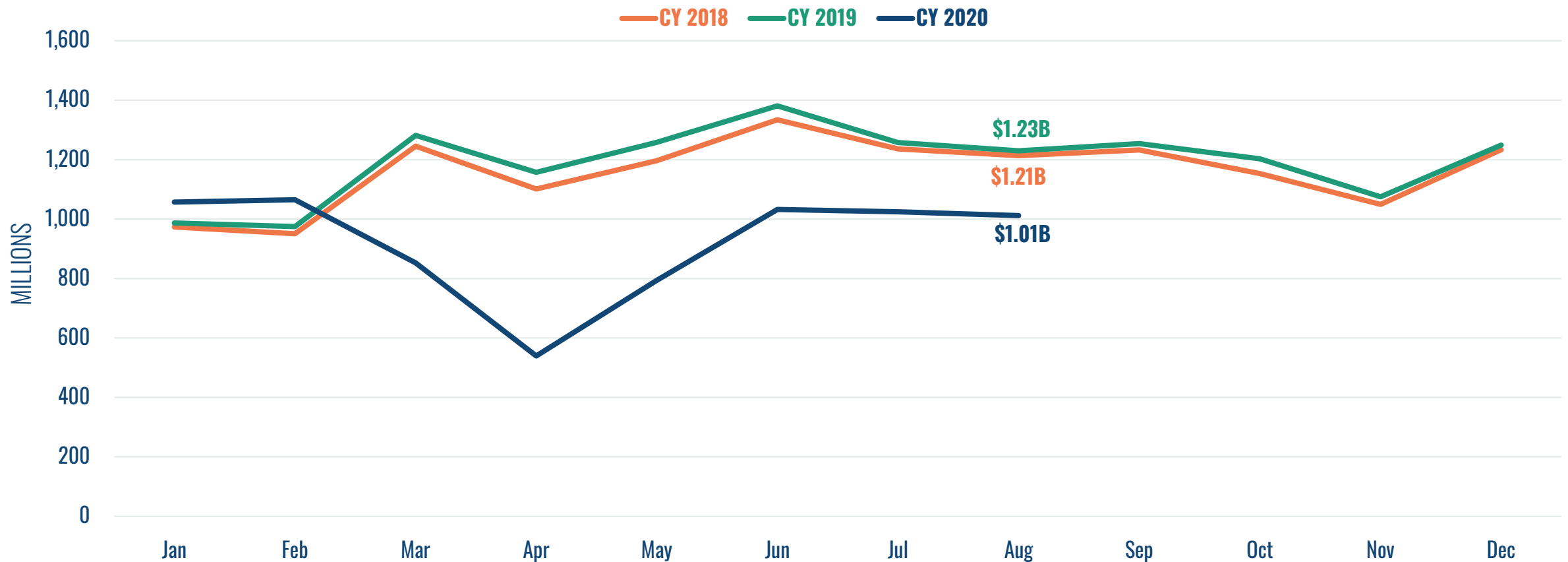
**For CYTD20,
preliminary reports
for Jan-Aug show a**
-22.6%
(\$2.2 billion)
DECREASE
**in tourism-related
sales revenue**

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CY Sales Revenue from Tourism-Related NAICS

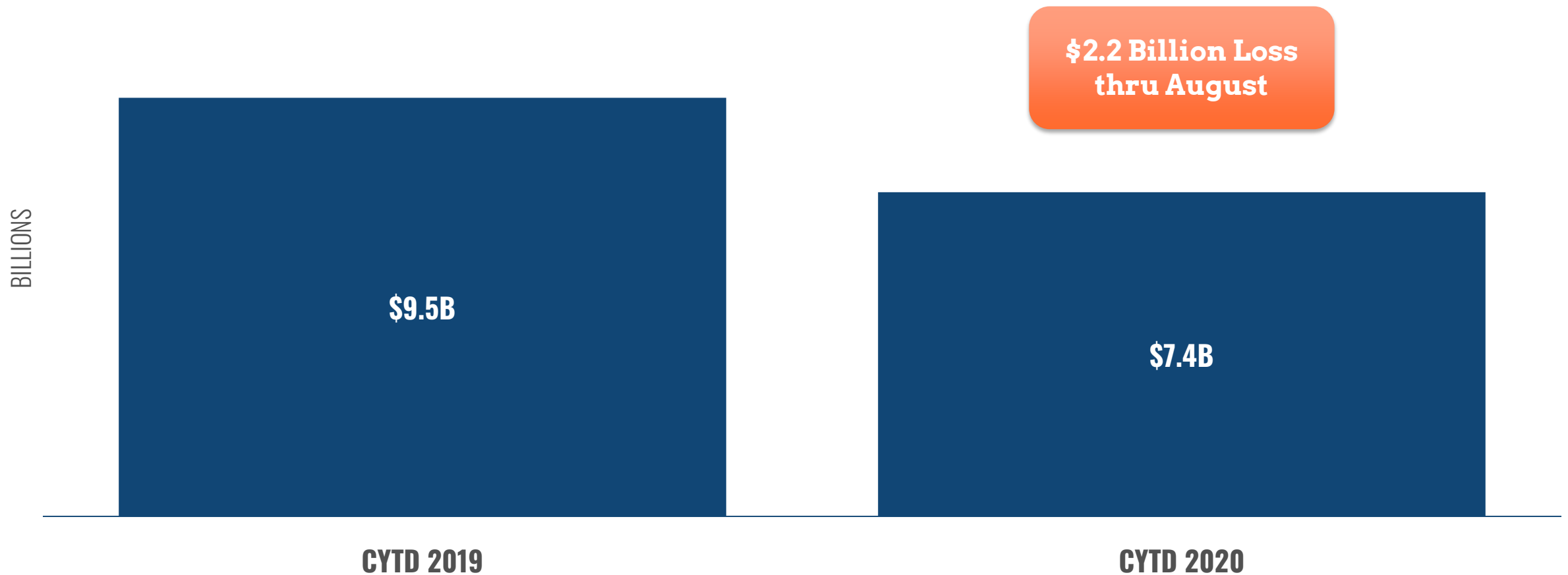


Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



CYTD January - August Sales Revenue from Tourism-Related NAICS

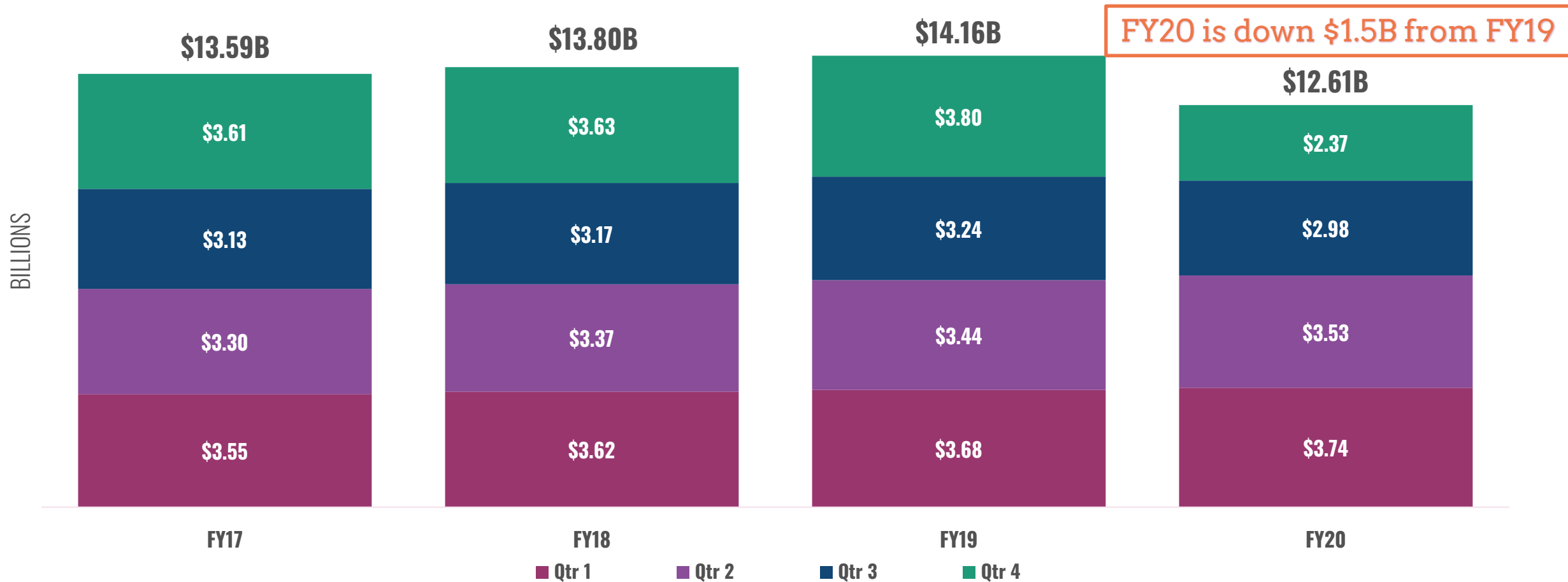


Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



FY Sales Revenue from Tourism-Related NAICS



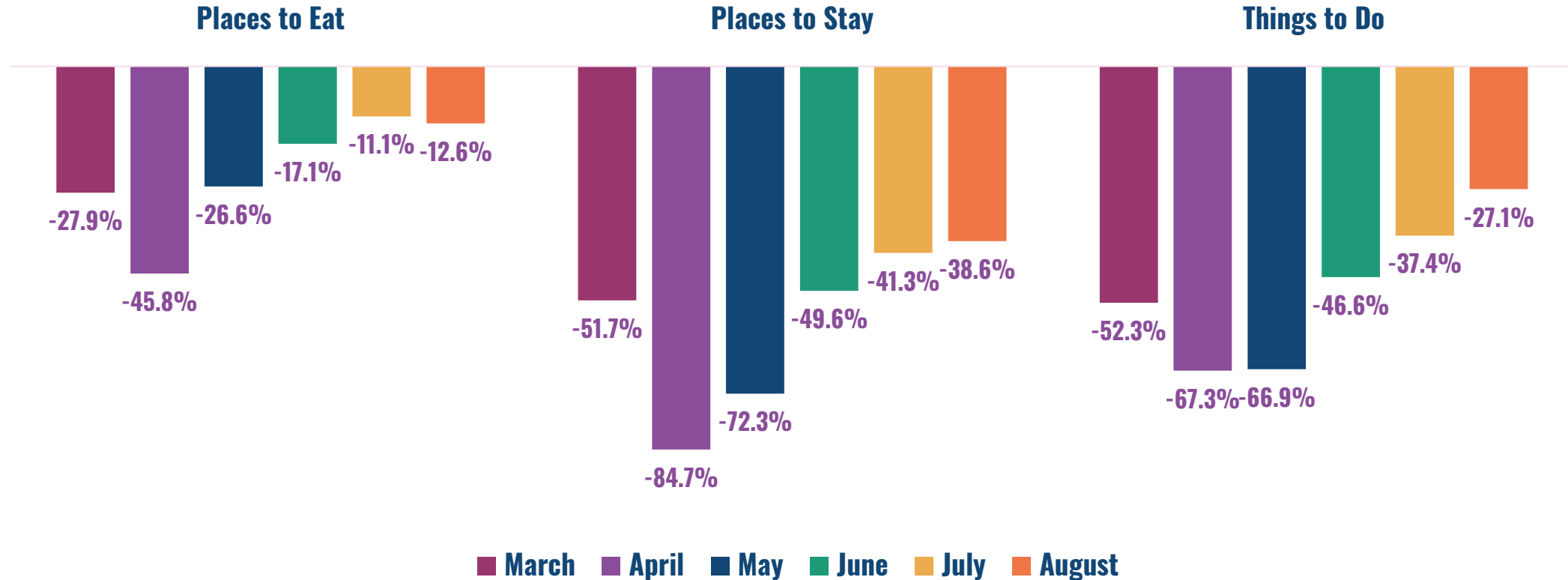
Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year



NAICS Tourism Business Sales

Change in March - August 2020 Compared to March - August 2019

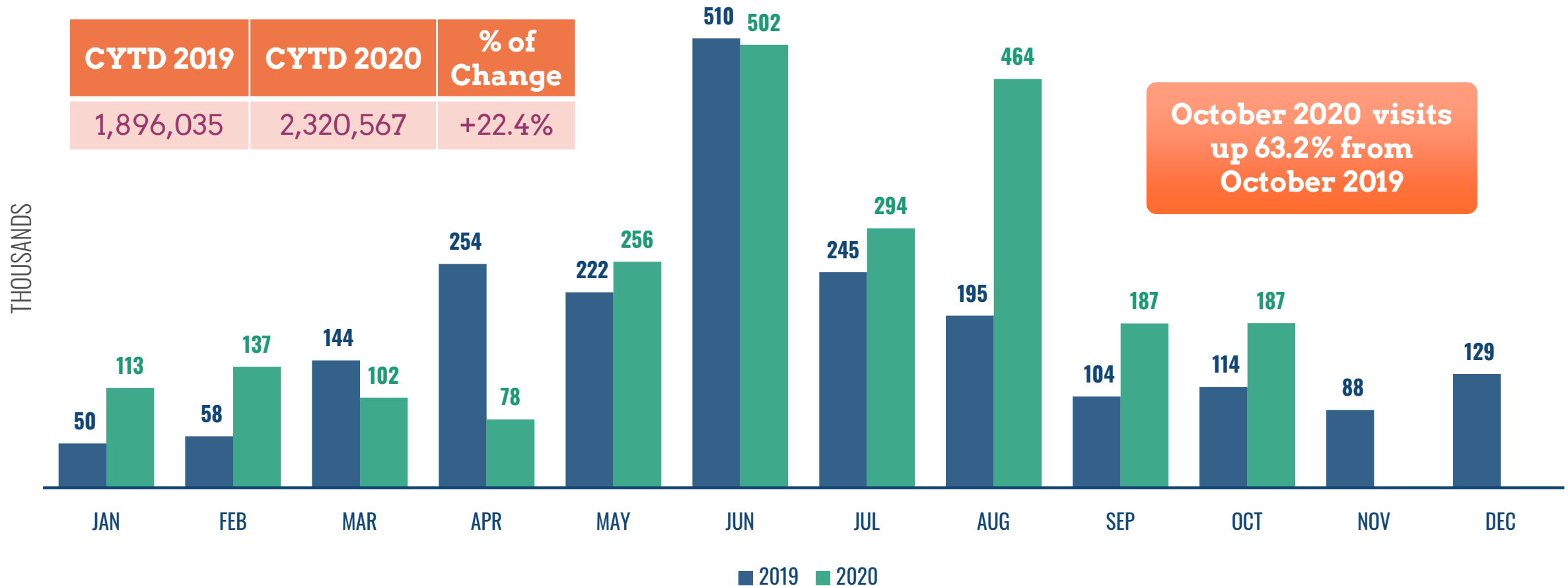


Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit responses in the early part of 2020

Calendar Year Visits to VisitMO.com by Month



May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

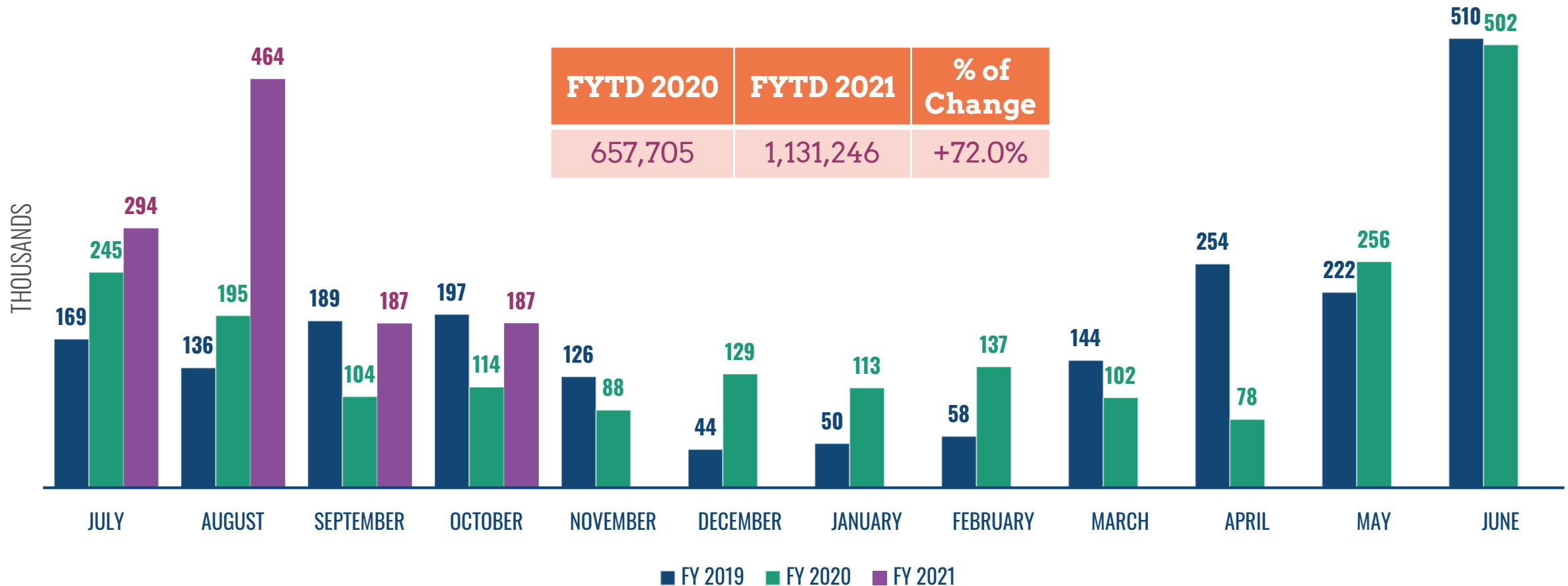
Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns.

Missouri Travel Barometer



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Fiscal Year Visits to VisitMO.com by Month



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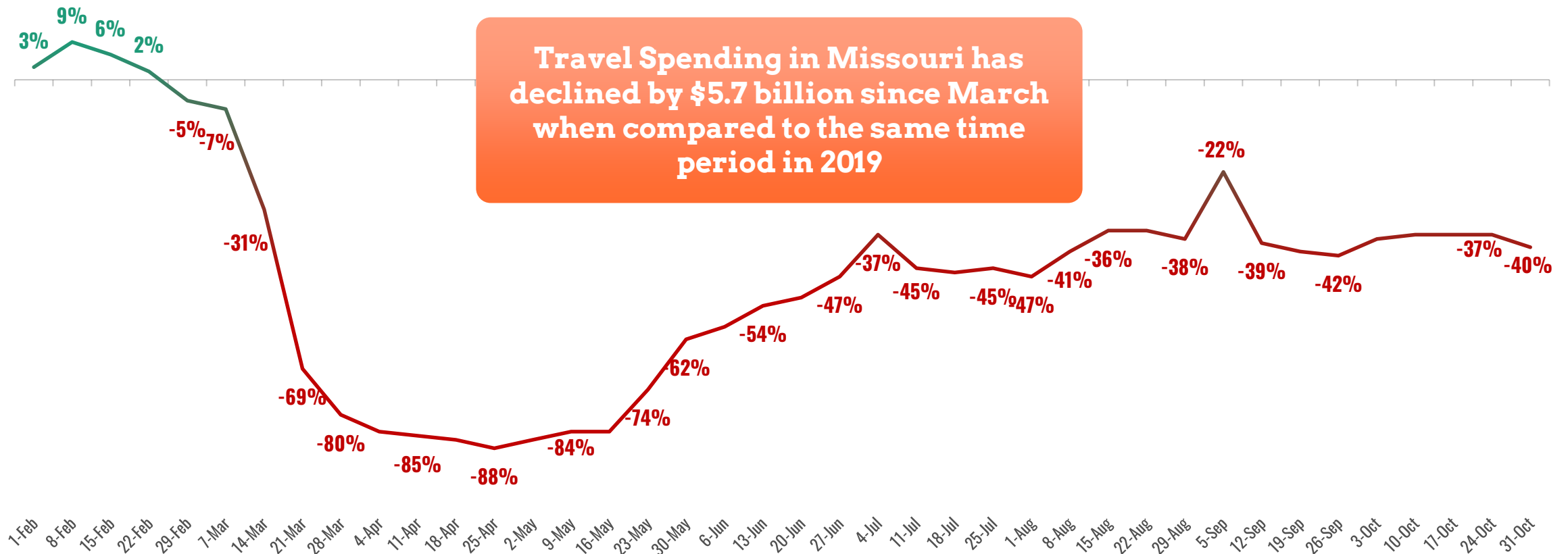
Missouri Travel Barometer

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Economic Impact

Year-Over-Year % Change in Weekly Travel Spending in Missouri

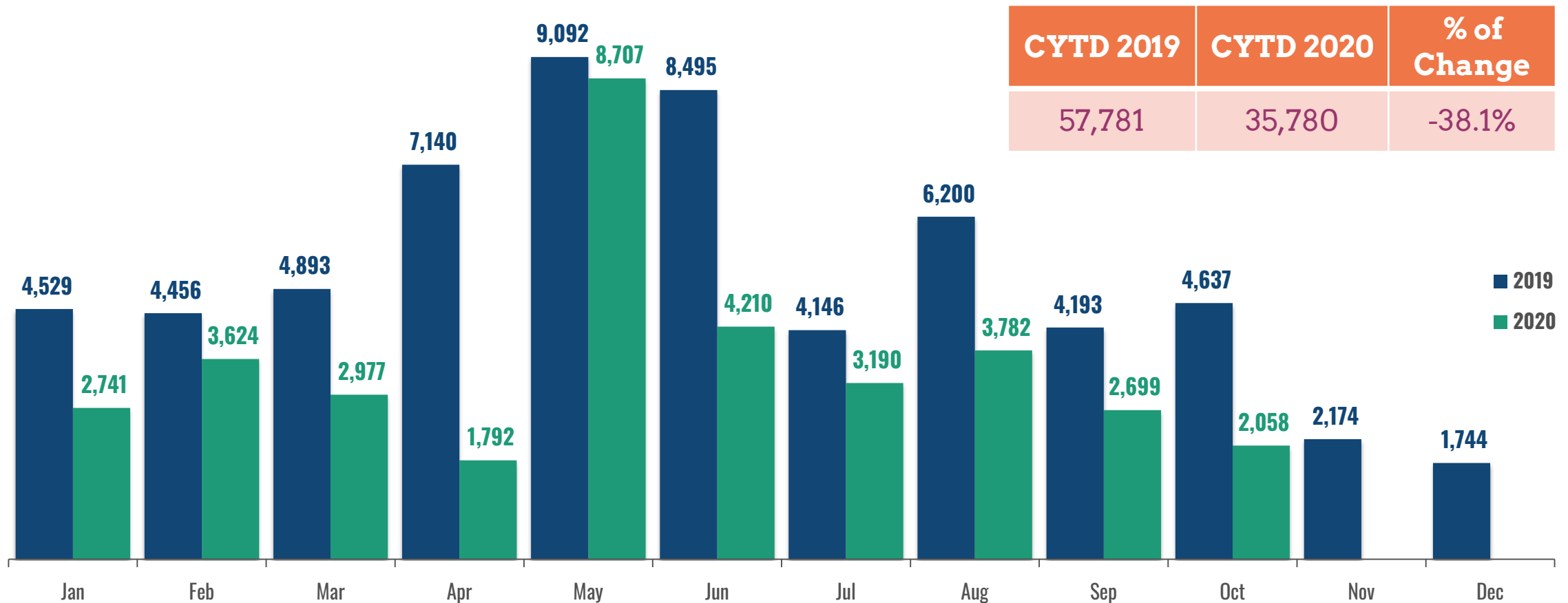


Missouri Travel Barometer



No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

Fulfillment of Travel Guide Orders from All Sources



Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.

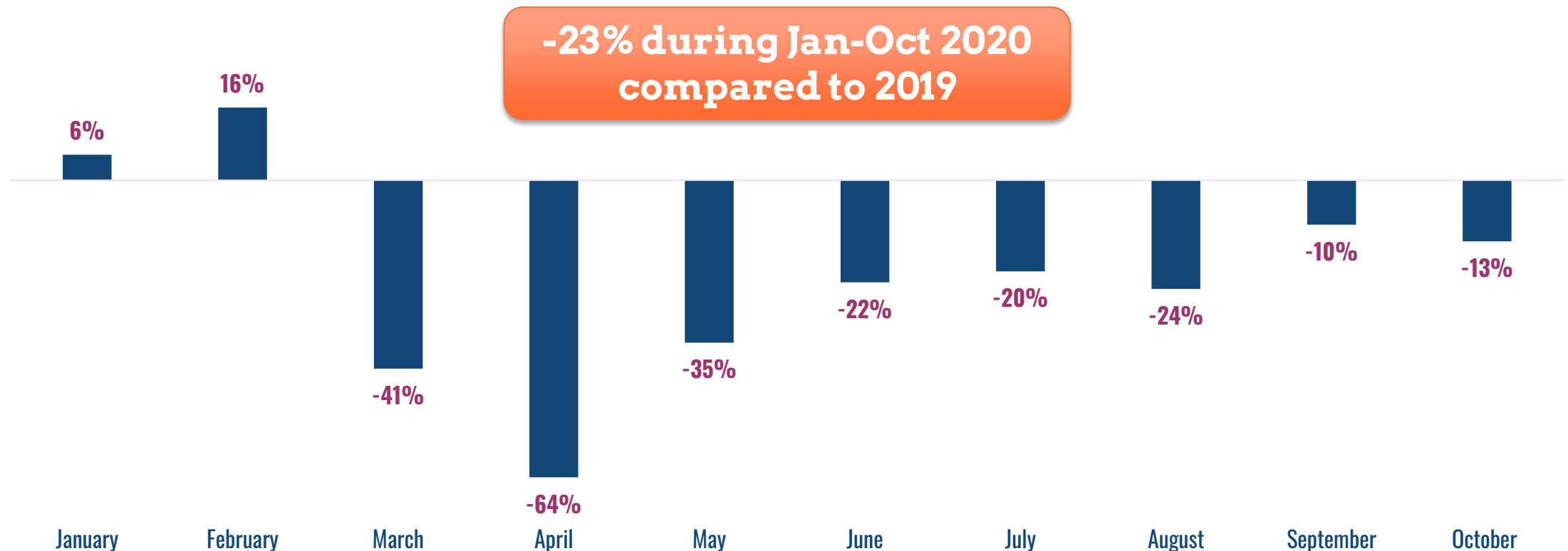
Missouri Travel Barometer



Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

Road Trips to Missouri as Reported by Arrivalist

**% of Change in Road Trips to MO by Month
2020 Compared to 2019**



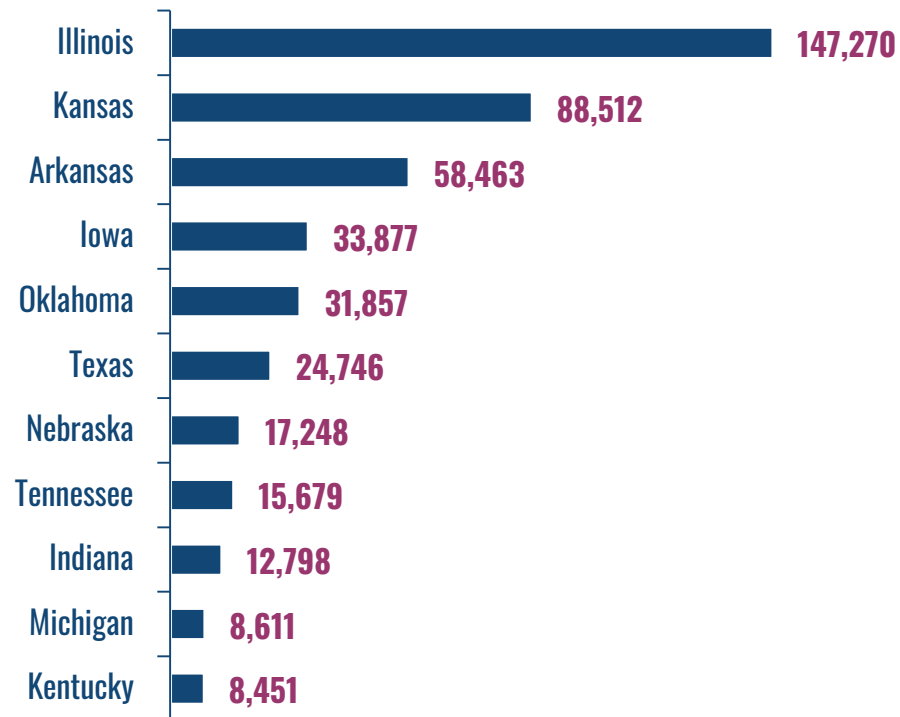
Missouri Travel Barometer



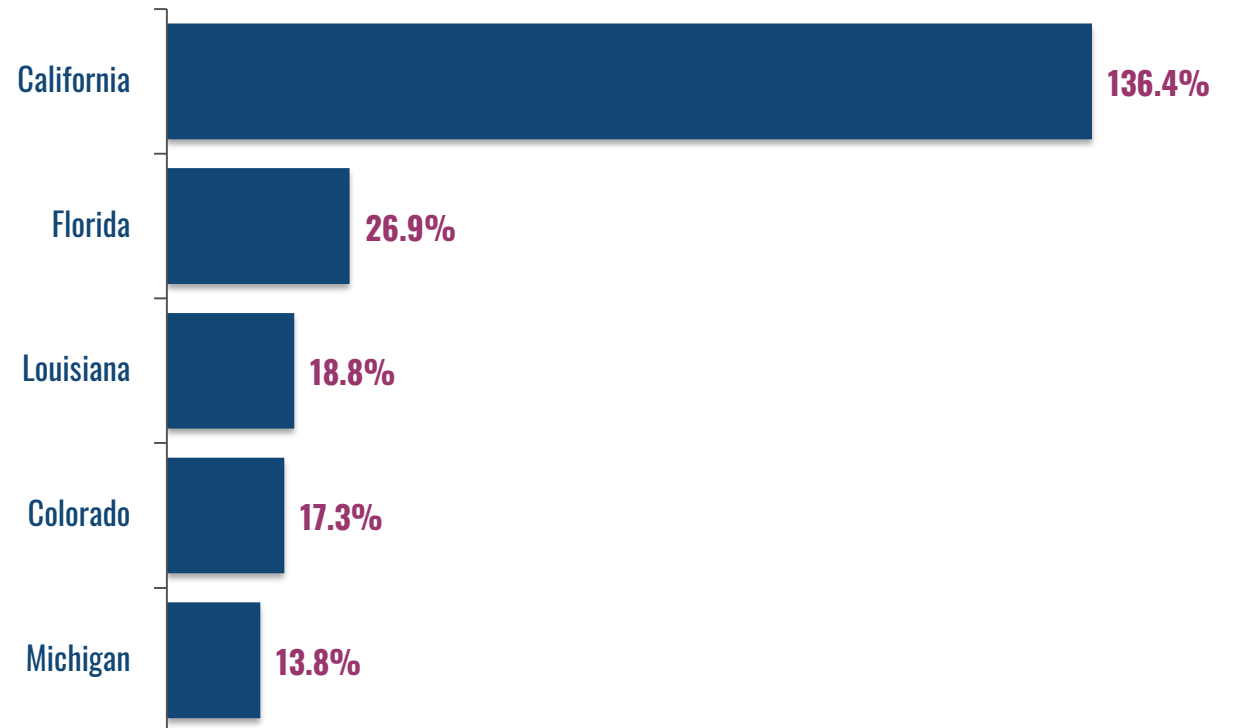
Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

October Road Trips to Missouri as Reported by Arrivalist

Top Nearby States for October Road Trips to MO



Top States that Increased Road Trips to MO Oct 2020 % of Increase over Oct 2019

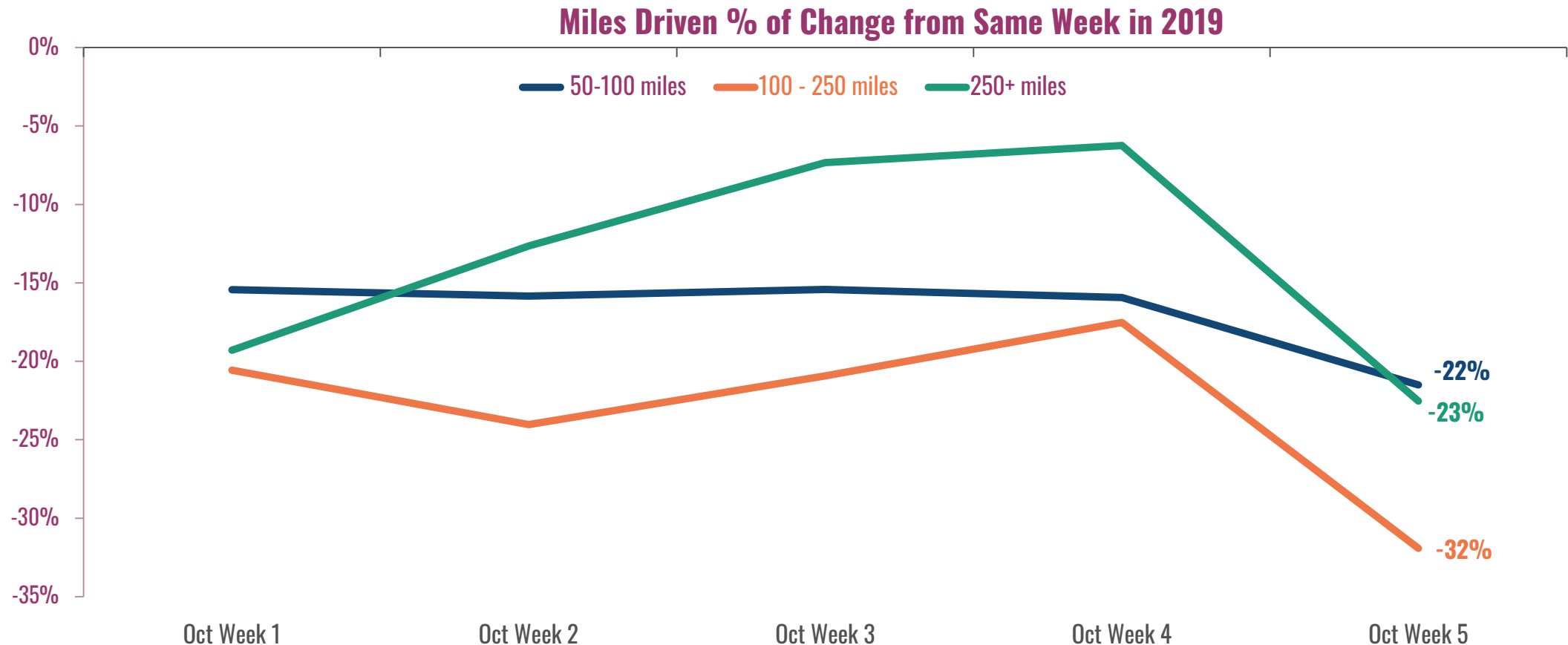


Missouri Travel Barometer



Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

Road Trips to Missouri as Reported by Arrivalist



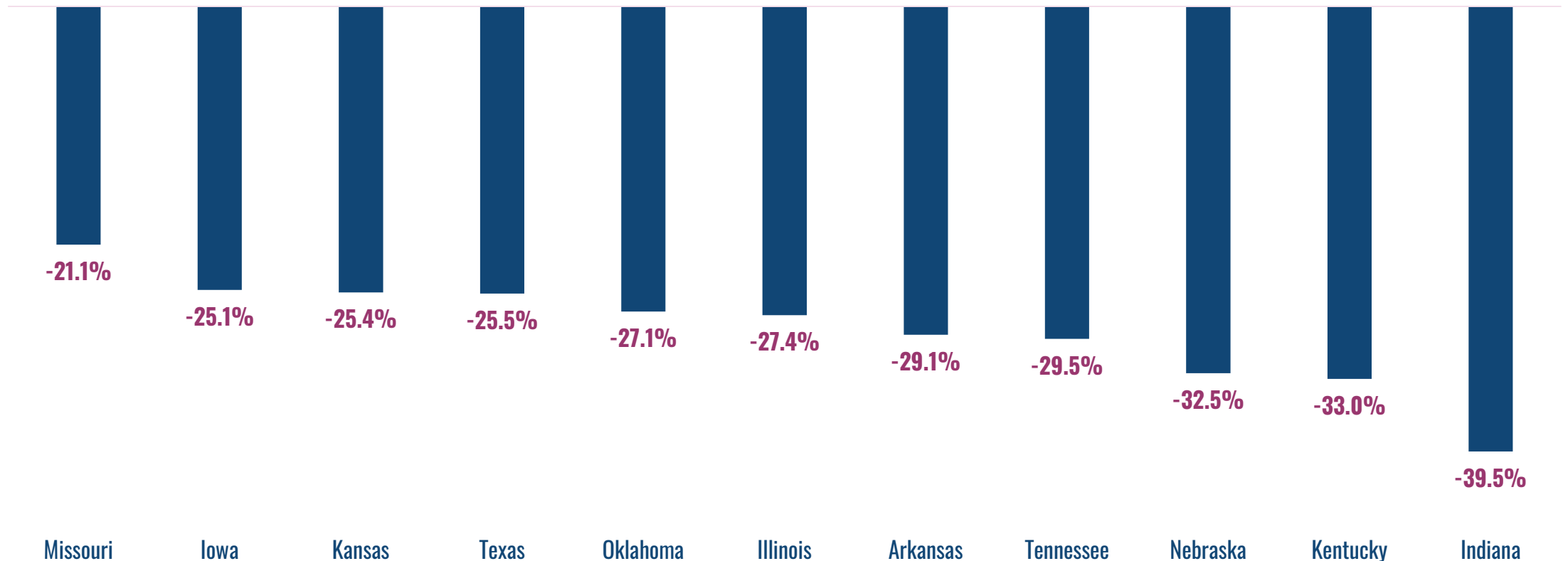
Missouri Travel Barometer



Daily drive trips of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours in Missouri

January – October Road Trips to Missouri as Reported by Arrivalist

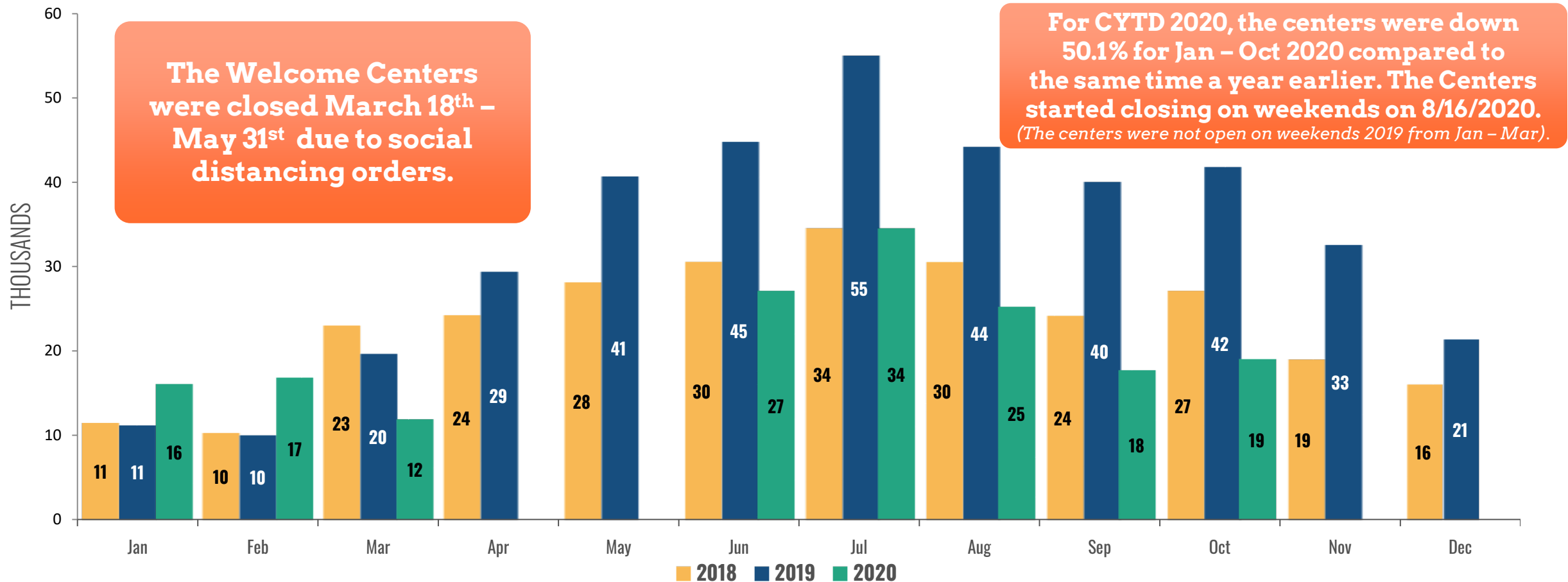
% of Change in Road Trips to MO by Nearby States 2020 Compared to 2019



Missouri Travel Barometer



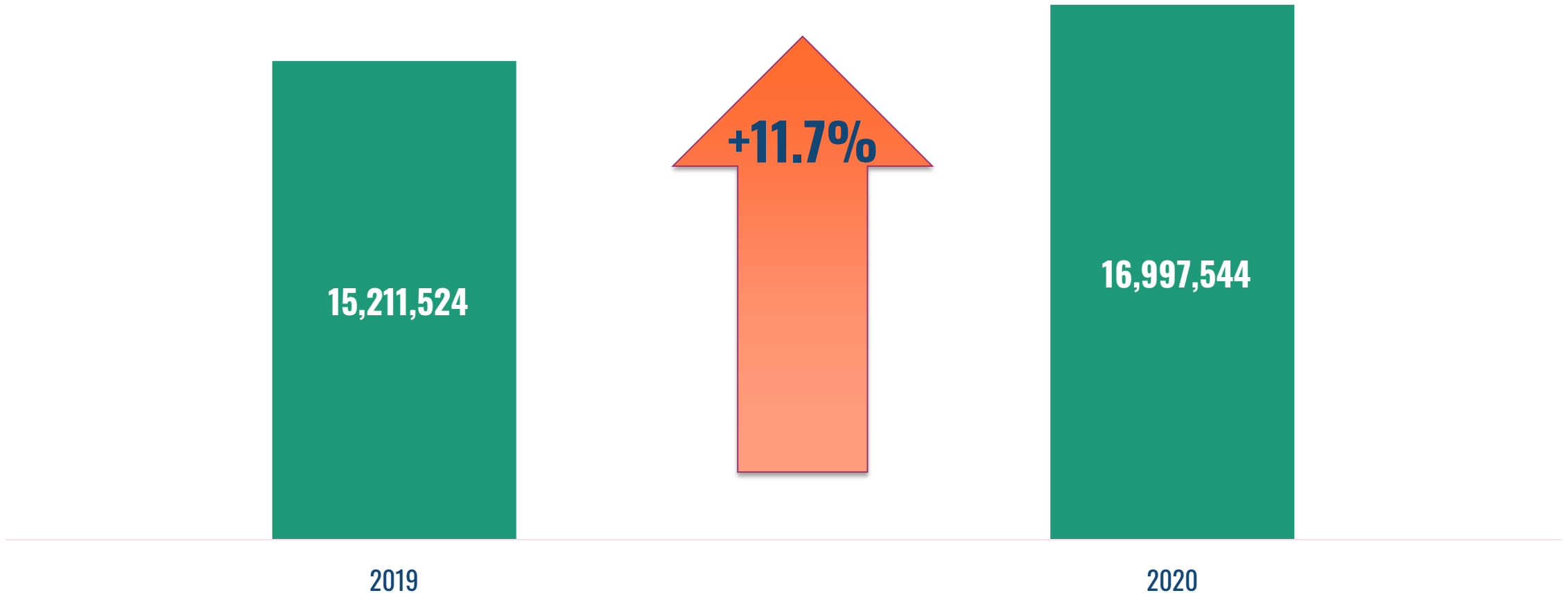
Welcome Center Visits: 2020 Calendar Year to Date through October



Missouri Travel Barometer



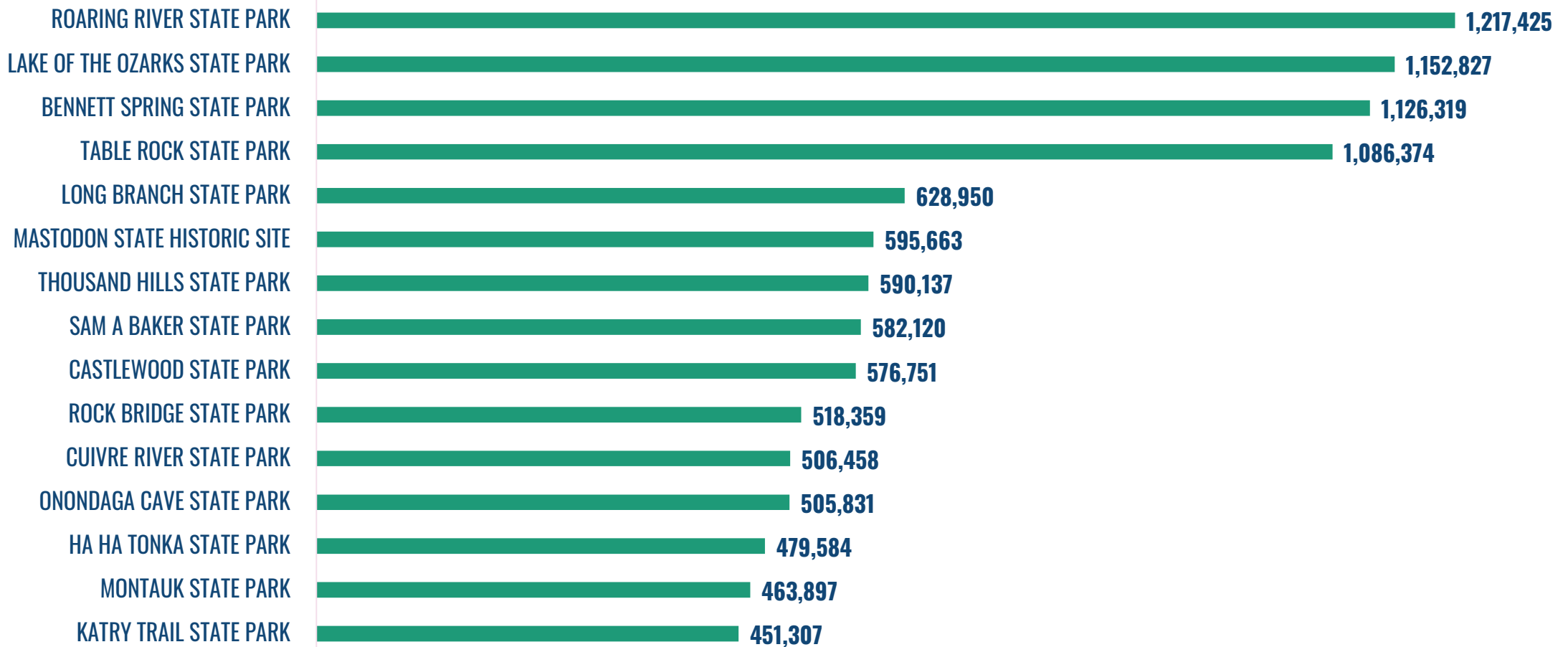
Visitors to Missouri State Parks during January - September



Missouri Travel Barometer

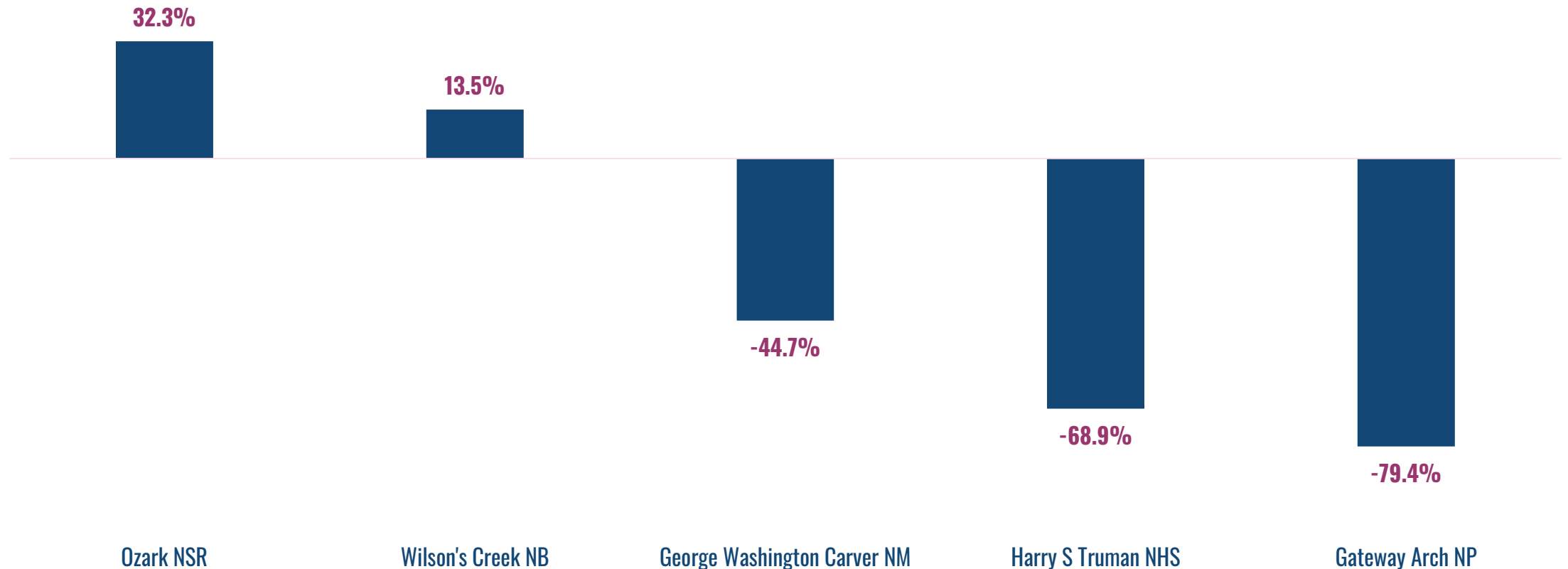


Most Visited Missouri State Parks during January - September



Missouri National Parks Attendance

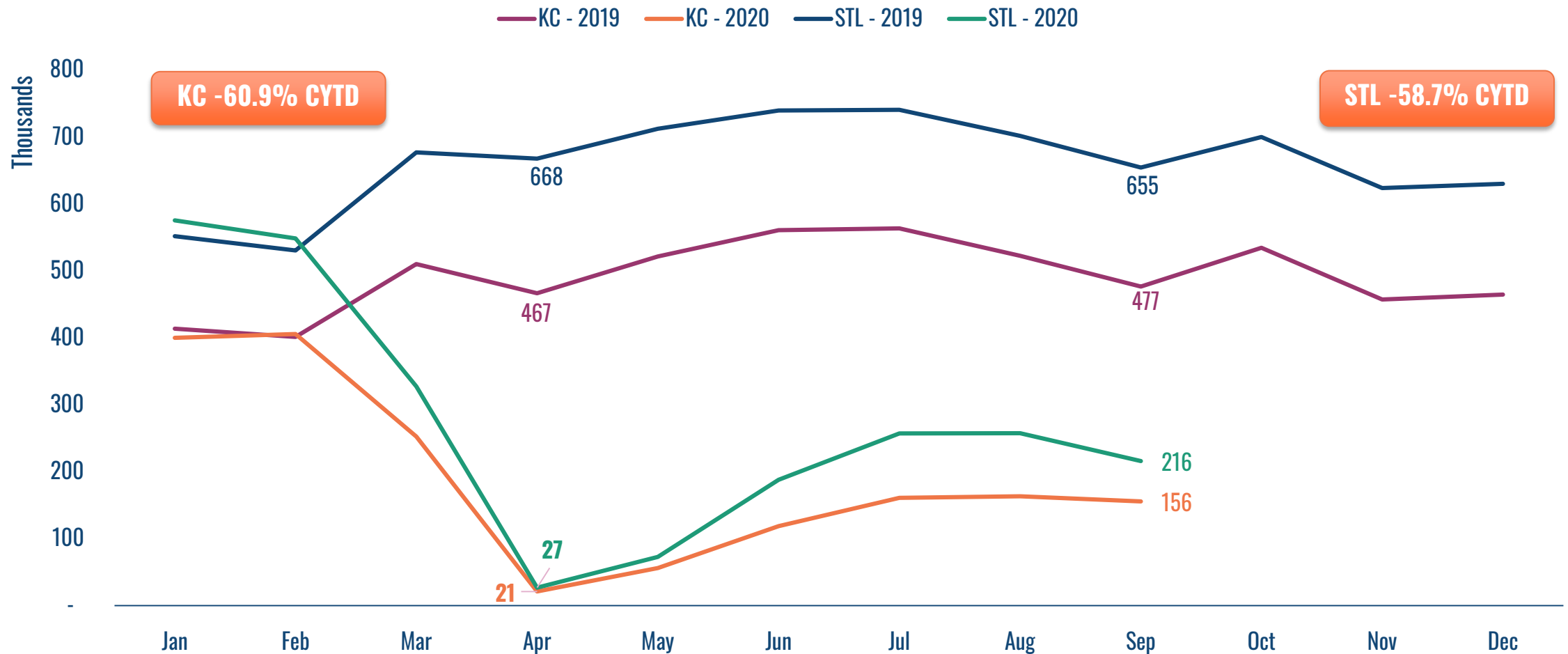
**% of Change in Visits to Missouri National Parks
January – September 2020 Compared to 2019**



Missouri Travel Barometer



KC & STL Airport Deplanements



THANK YOU

